

Overview

This Job Aid defines the steps to follow to develop the project plan in Planner.

There are five (5) core actions required to develop the project plan:

1. Create the project plan
2. Identify the work (Predictive and Adaptive)
3. Establish dependencies
4. Assign resources
5. Estimate the work and manage the overall plan

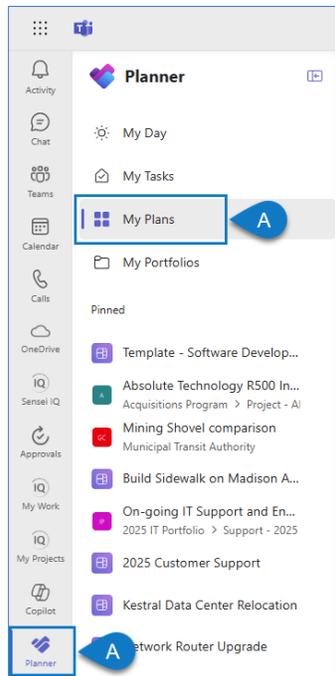
Create the plan in Planner

 Project Manager

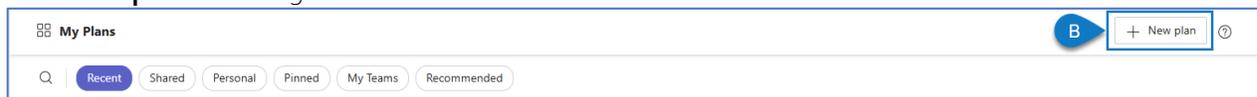
 Planner

1. CREATE NEW PLAN FROM SCRATCH (OPTION 1)

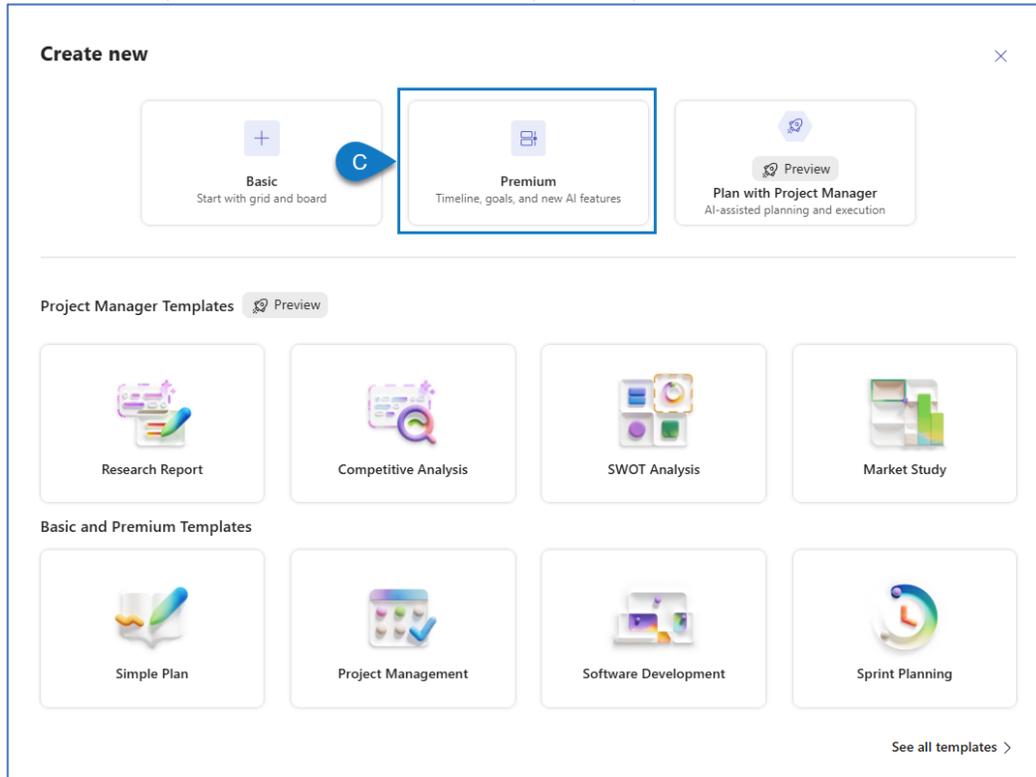
- a. **Open Planner** from the Teams App Bar. Alternatively, you could open Planner in a web browser using <https://planner.cloud.microsoft>. Both these options assume you are using **Planner installed in the default environment**. If your organization is using Planner in a named environment, please follow your organizational procedures. **Select My Plans** from the Planner navigation on the left.



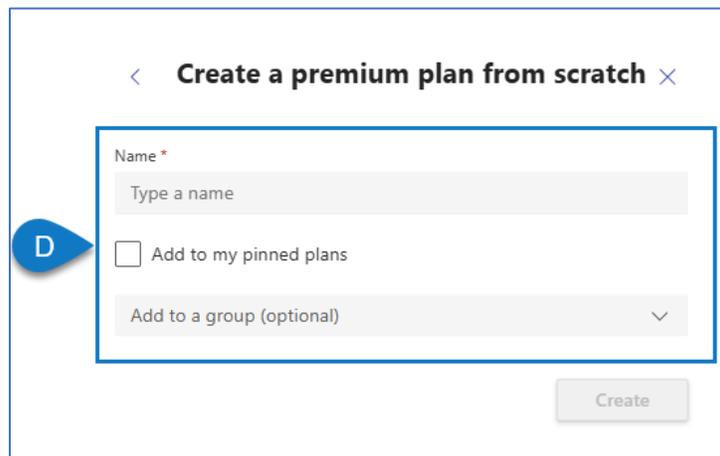
- b. Click **New plan** on the right.



- c. Here you can create a **new plan from scratch** or access a series of templates provided by Microsoft. While you are welcome to explore these built in Microsoft templates at your leisure, for now select **Premium**.

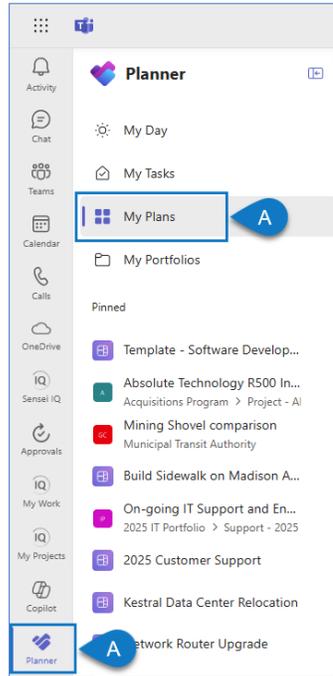


- d. Give the **project a meaningful name**. You will likely want to select **Add to my pinned plans** to make it easy to find this project in the future. For now, **leave the Group blank**.

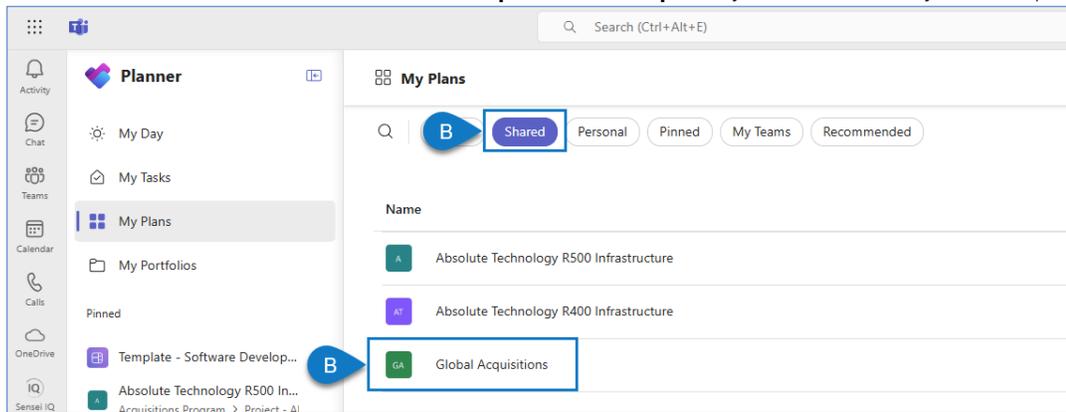


1. CREATE NEW PLAN FROM AN EXISTING SCHEDULE OR TEMPLATE (OPTION 2)

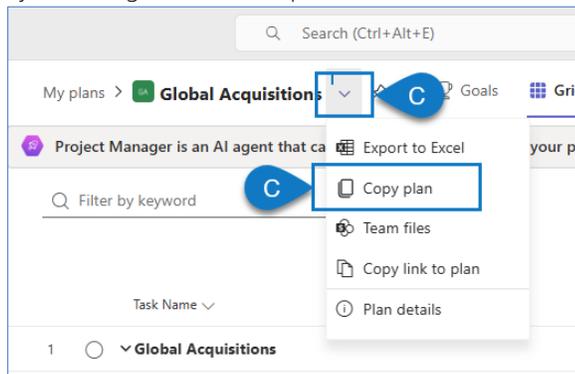
- a. **Open Planner** from the Teams App Bar. Alternatively, you could open Planner in a web browser using <https://planner.cloud.microsoft>. Both these options assume you are using **Planner installed in the default environment**. If your organization is using Planner in a named environment, please follow your organizational procedures.



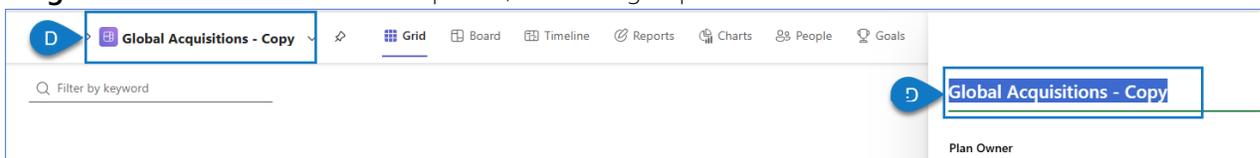
b. Click the **Shared Button**, and then **search for and open the template** you wish to base your new plan on.



c. Click the **down arrow** immediately to the right of the Template Plan name and select **Copy plan**.

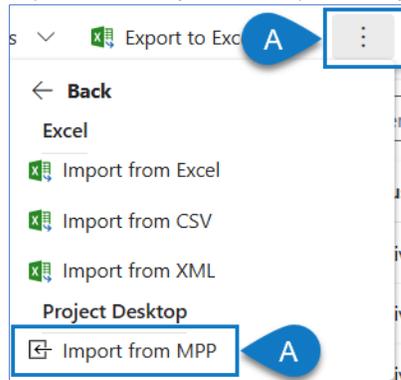


d. Notice that the name is initially set to the original name plus "Copy", so you should change this right away by **double clicking on the Plan name**. As with Option 1, leave the group blank for now.

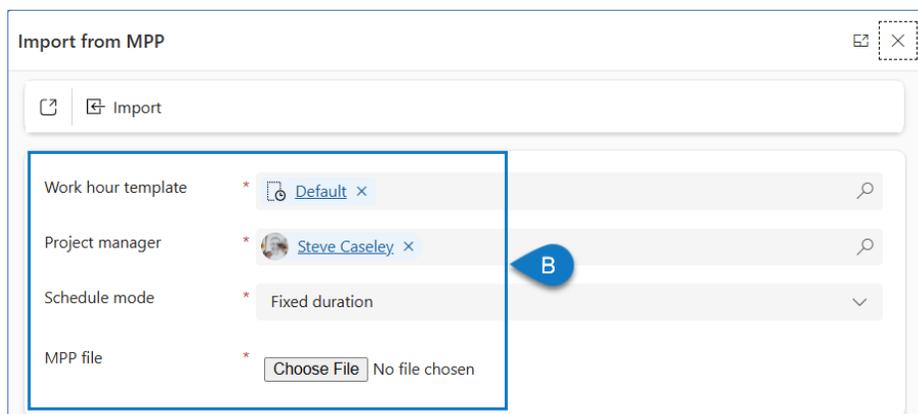


1. CREATE NEW SCHEDULE FROM AN MPP FILE (OPTION 3)

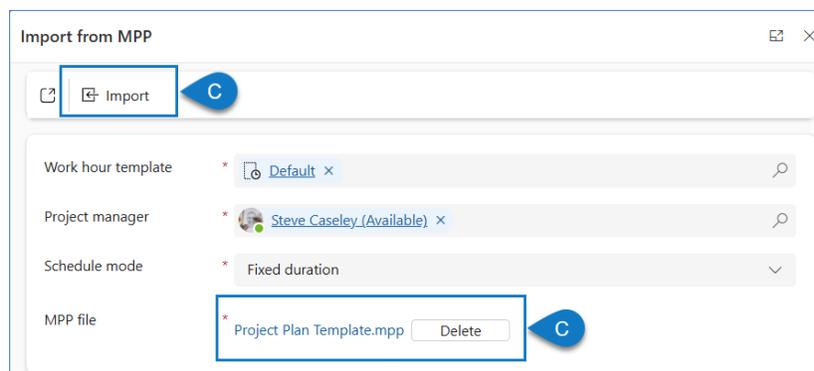
- a. To import an MPP file, you need to use the **Project Power App**. Please contact your System Administrator if you do not have this URL as it will be different in every organization. Once you are in the app, **navigate to Plans** and then from the ribbon, **select Import**. In my case, due to my screen size, I need to **select the ellipsis to see Import**. As you can see you have several other import options which you can explore on your own. **Select Import from MPP**.



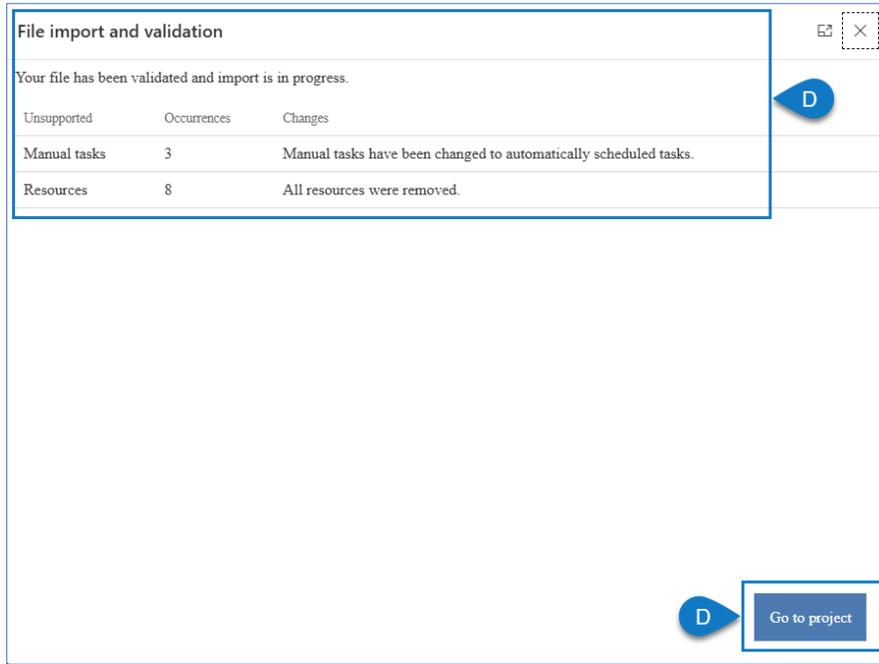
- b. You can define the **Work hour template** based on organizational policies to set the working hours for this plan. While you can change the **Project manager's name**, please be aware that this person will be the owner of the plan so you should only change this field if someone else will be taking over the plan right away. While you can select the **Schedule mode** as needed, we recommend you leave it as Fixed duration. Select the **Choose File** button.



- c. Search for and **select the MPP** file to be imported and then **click Import**.



- d. When the import is complete, a **summary of the results will be presented**. The new plan name will initially be set to the import file name, but you can change it as needed. Click **Go to project** to see the results on the Summary and Tasks tabs.

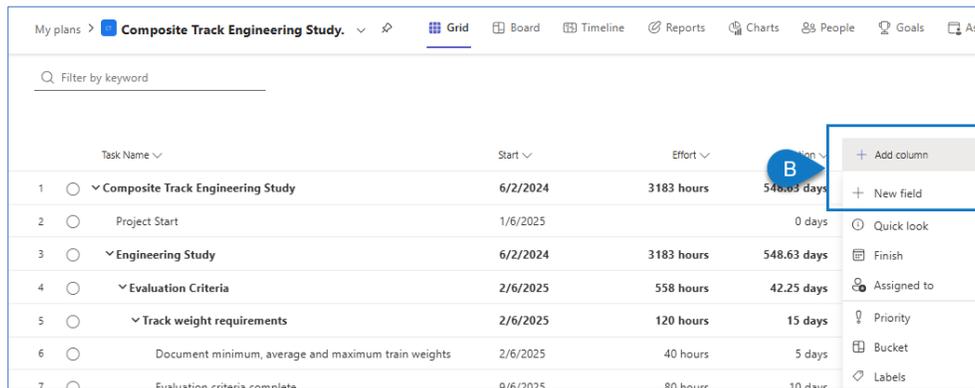


2. CONFIGURE PLANNER

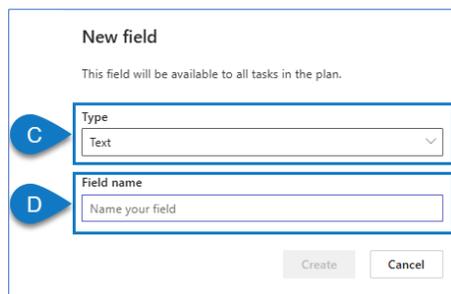
- Add **custom columns** to capture project specific information by opening the project in **Planner** and ensure you are in the Grid view.



- Select **Add column** and then **+ New field**.



- Define the type of field.
- Give the new column a meaningful name.

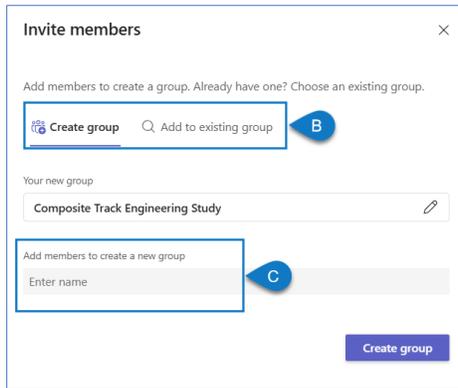


3. SHARE THE PLAN

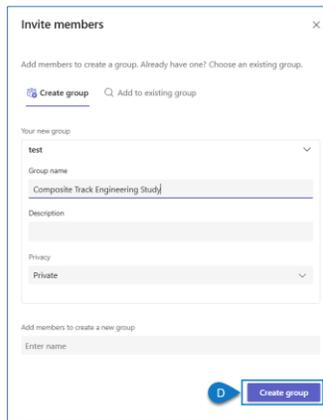
a. Open the project in **Planner**, and then click **Share** from the top right corner.



- b. Based on organizational group policies **Create group** (recommended) or **Add to existing group**.
- c. Search for and select the **team members** and **stakeholders**.



d. Click **Create group** to create the team as a Microsoft 365 group.



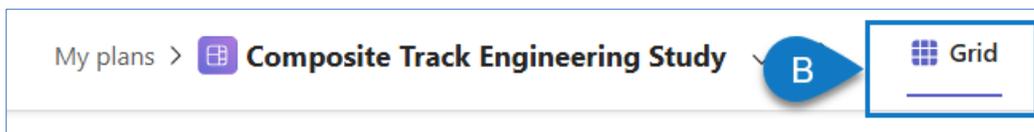
Identify the work (Predictive)

 **Project Manager**

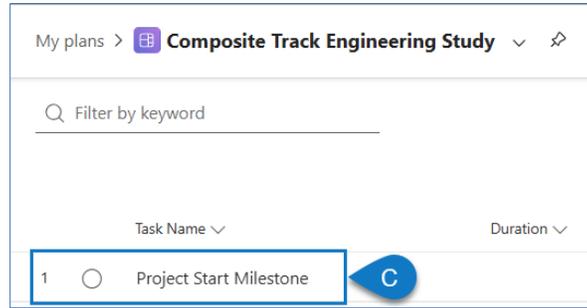
 **Planner**

1. CAPTURE PROJECT DELIVERABLES

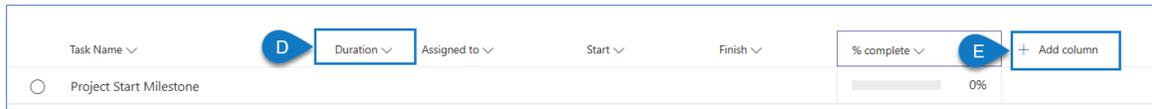
- a. Open project plan in **Planner**.
- b. Click **Grid** from the ribbon. You can apply these same steps to Identify Work using the Timeline view.



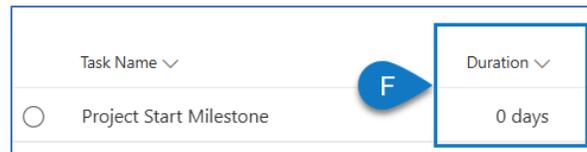
- c. Create a **project start milestone** as the first line in the new plan. Replace "Add new task" with a project start milestone.



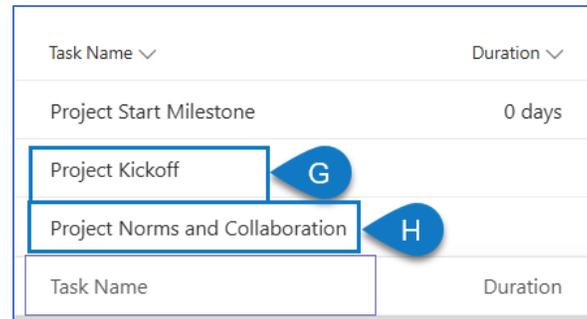
- d. Ensure that the **Duration column** is visible.
- e. Select **Add column** to add it if necessary.



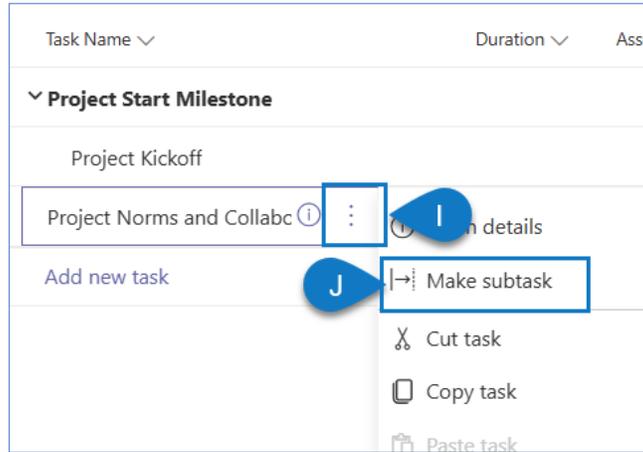
- f. Set the Duration to zero to make it a Milestone.



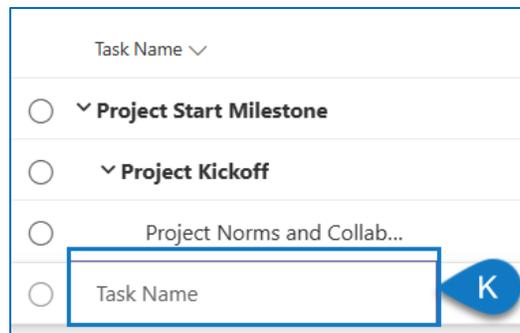
- g. Define the first **phase** of the project by typing the phase name in the 'Add new task' area.
- h. Continue to add the first **deliverable** in the same way.



- i. Hover your mouse over the deliverable name to activate the **ellipsis** and click on it to open the **task sub-menu**.
- j. Click **Indent** task to make it a "child" of the Phase.

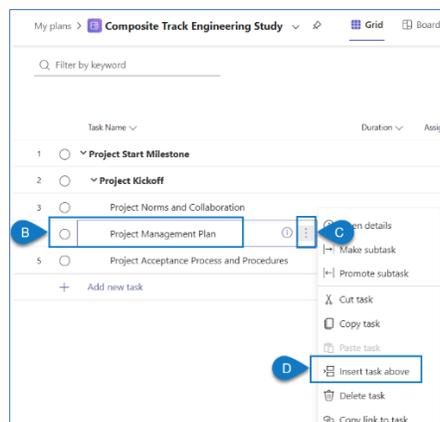


k. Continue to add Milestones, Phases, and Deliverables in the same way.

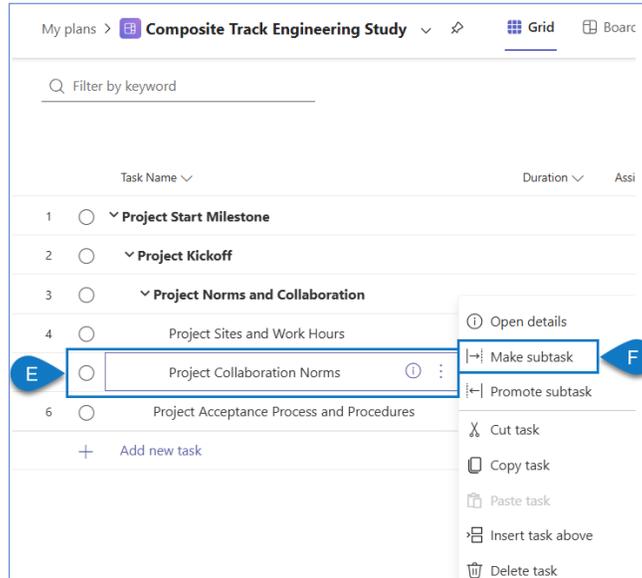


2. CAPTURE PROJECT SUB-DELIVERABLES

- a. With the Phases, Deliverables and Milestones identified, the high-level Work Breakdown Structure (WBS) is complete. Now we need to **decompose the WBS into sub-deliverables** (if needed) and tasks (to be discussed in the next section).
- b. **Insert a new line** between the first two deliverables by selecting the second deliverable.
- c. Hover your mouse over the deliverable name to activate the **ellipsis** and click on it to open the **task sub-menu**.
- d. Click **Insert task** above to add the sub-deliverable.



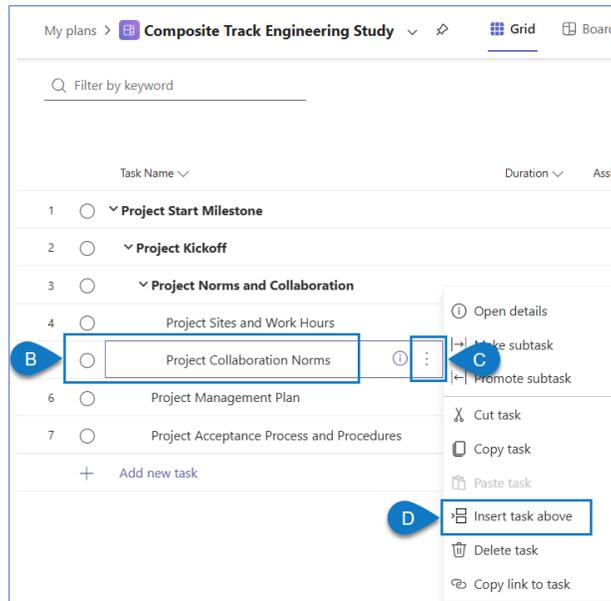
- e. Hover your mouse over the new sub-deliverable and select the **ellipsis** to open the **task sub-menu**.
- f. Click **Make subtask** to make it a sub-deliverable.



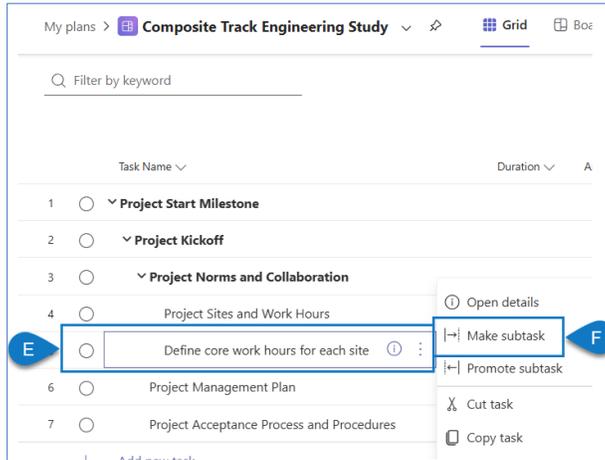
g. Continue to decompose the WBS as required.

3. CAPTURE PROJECT TASKS

- a. The final level of decomposition is to decompose the sub-deliverables into **detailed tasks**.
- b. **Insert a new line** between the first 2 sub-deliverables by selecting the second sub-deliverable.
- c. Hover your mouse over the sub-deliverable name to activate the **ellipsis** and click on it to open the **task sub-menu**.
- d. Click Insert task above to add the first task.



- e. Identify the first task and then hover your mouse over the new task and select the **ellipsis** to open the **task sub-menu**.
- f. Click **Make subtask** to make it a sub-deliverable.



g. Continue to decompose the WBS as required.

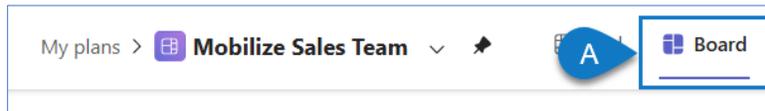
Identify the work (Adaptive)

Project Manager

Planner

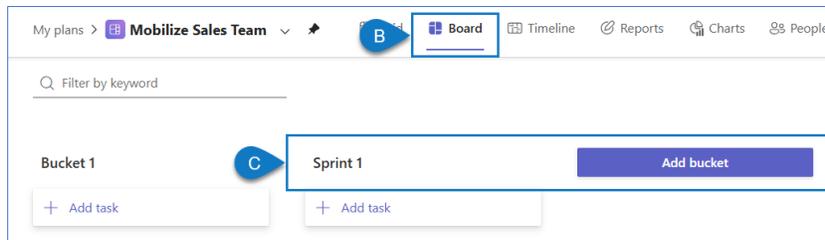
1. CONFIGURE THE BOARD

a. Open project schedule in **Planner**.



b. Click **Board** from the ribbon.

c. Configure the board by creating **buckets** (columns, Kanban processes) as appropriate for the project delivery approach by clicking **Add bucket** and giving the new bucket an appropriate name.

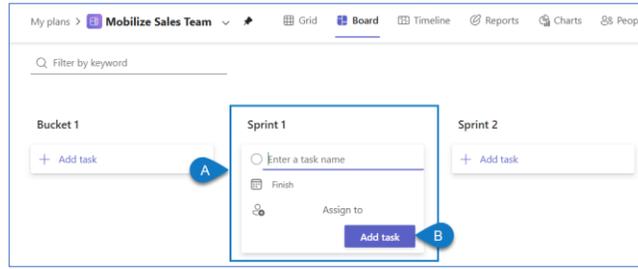


d. Continue to add buckets until the board is fully defined.

2. CAPTURE STORIES

a. Capture the first story for the project by clicking **Add task** from the appropriate column and capture the story.

b. Click **Add task**.



c. Continue to add stories to the project in the same way.

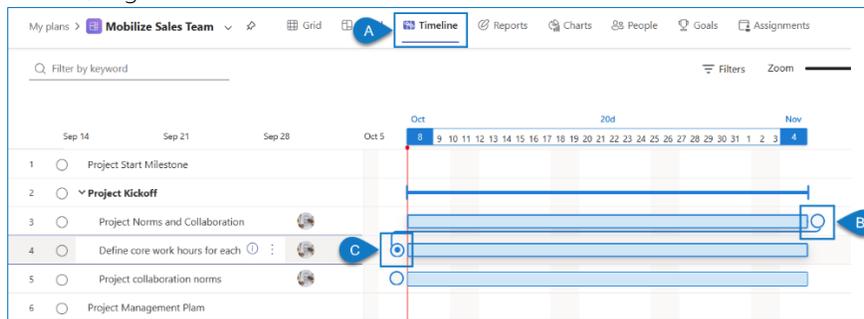
3. ORGANIZE THE BOARD

a. Ensure the stories are in the correct column/bucket by dragging and dropping them into the appropriate location.

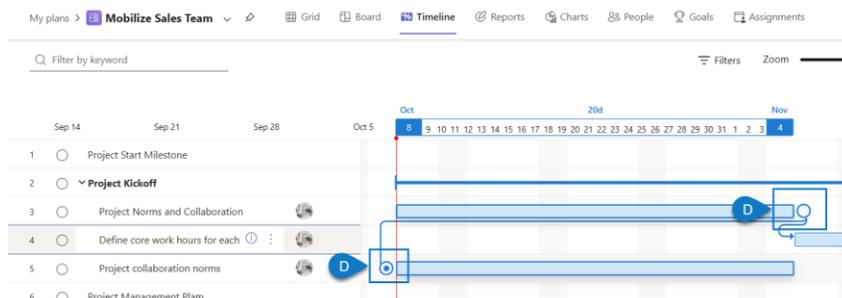
Establish dependencies

1. CREATNG DEPENDENCIES IN THE TIMELINE VIEW

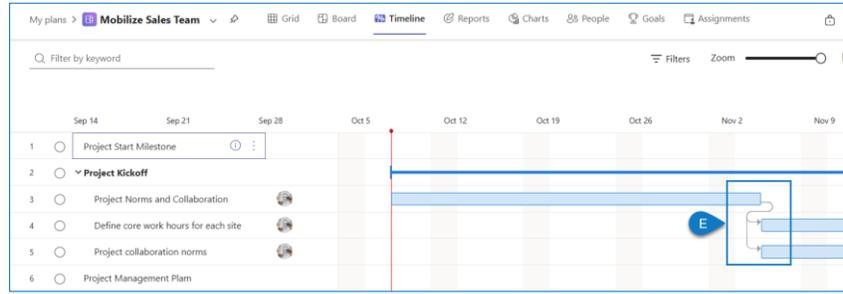
- a. Ensure you have the appropriate project open in **Planner** and the **Timeline view** selected.
- b. Hover your mouse over the end of the Gantt bar for the successor, and then click and drag to the beginning of the successor task
- c. And release the mouse to create the dependency. This will create a **Finish-Start dependency** with **no Lead or Lag** only. **See Step 3** below for details on how to edit existing dependencies and/or create new dependencies to use a different type and Leads/Lags.



d. Create **additional dependencies in the same way**.

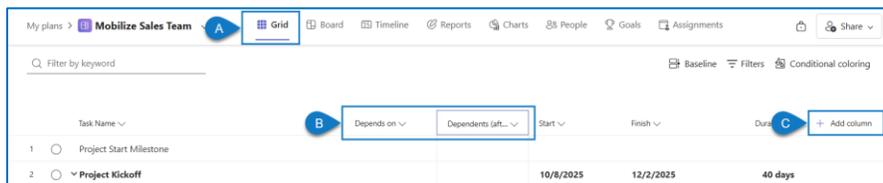


e. A single task can have **many predecessors and successors**.

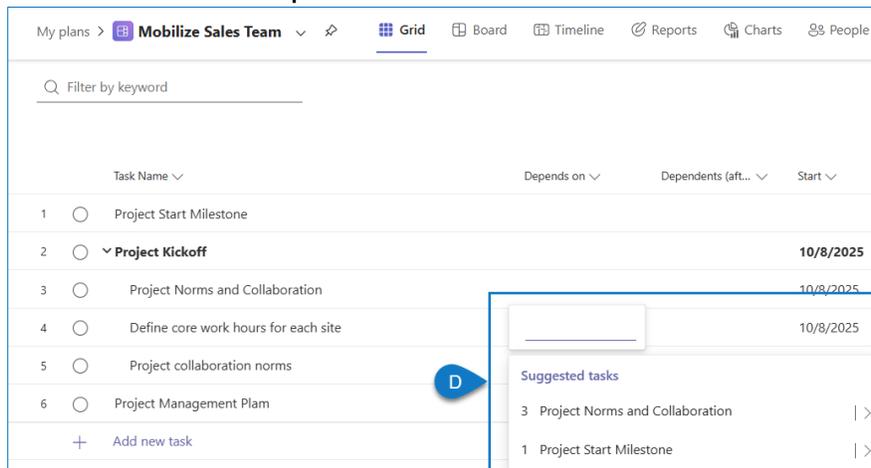


2. CREATING DEPENDENCIES IN THE GRID VIEW

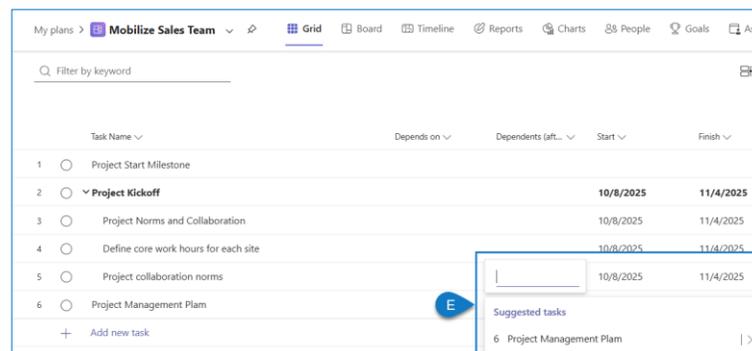
- a. Ensure you have the appropriate project open in **Planner** and the **Grid view** selected.
- b. Ensure the **Depends on** and **Dependents** columns are visible.
- c. Click in **Add column** to add one or both as needed.



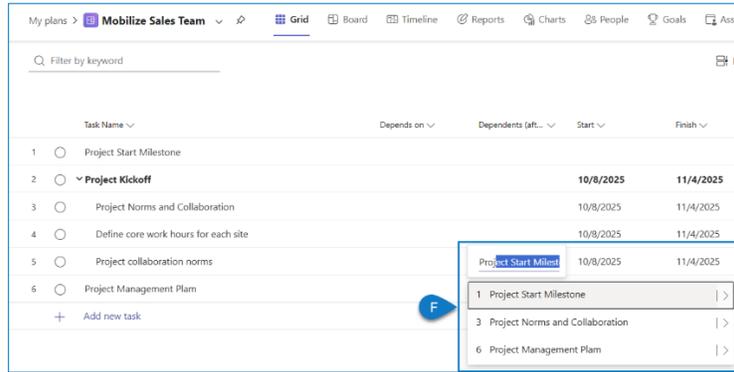
d. Click in the **Depends** on column to add a **predecessor** task or



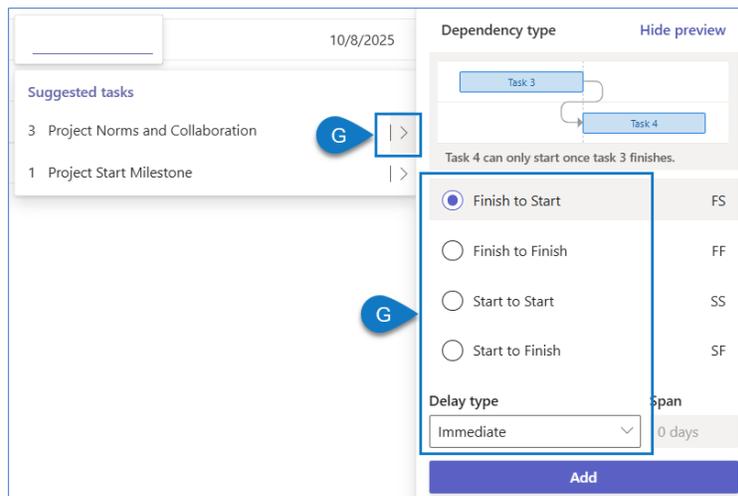
e. The **Dependents** column to add a **successor** task.



f. Select the appropriate dependency from the **auto-generated list** or **begin typing** a task name or **line number** to select a different task.

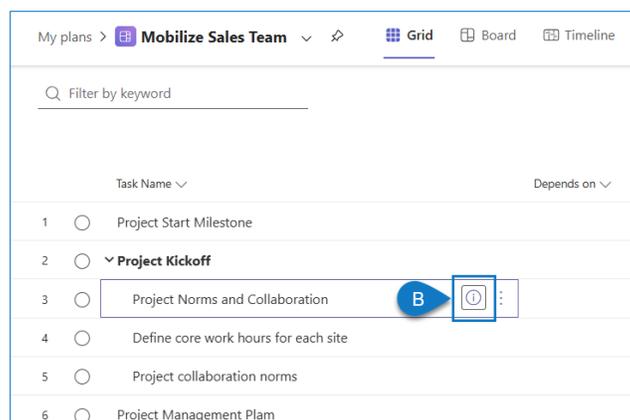


- g. Click on the **right arrow** to open a panel where you can change the **dependency type** and/or add a **lead/lag** in the delay type.

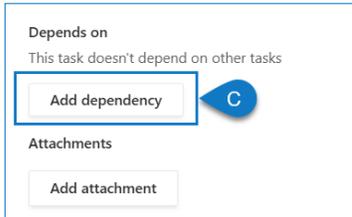


3. CREATNG DEPENDENCIES IN THE TASK PANE

- a. Ensure you have the appropriate project open in **Planner**.
- b. In any view, hover your mouse over a task to activate the **"i" icon** and select it to open the task pane.

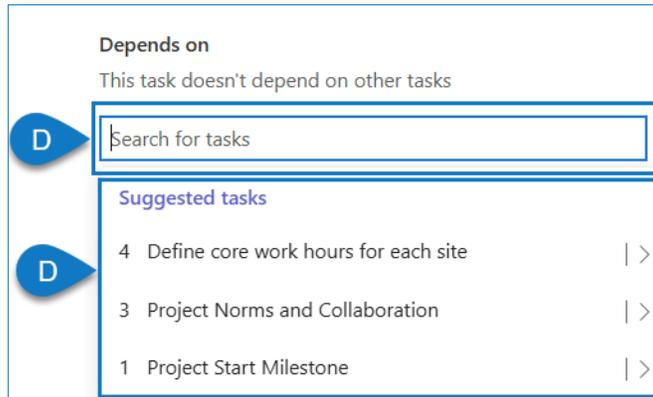


- c. Click **Add dependency**, which is near the bottom of the Task Pane to add a predecessor task(s). You cannot add successor tasks using the task pane.

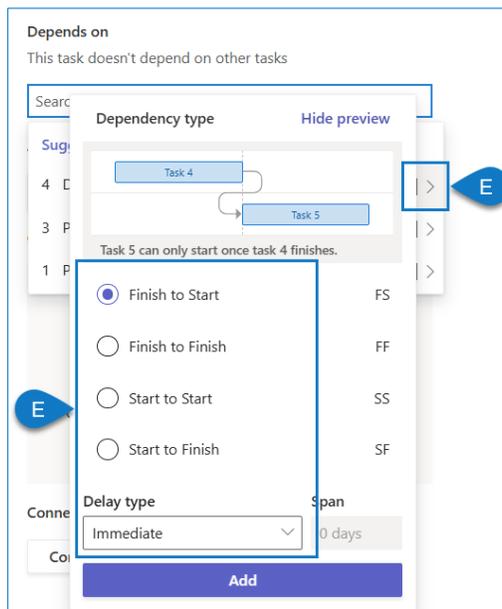


Select the appropriate dependency from the auto-generated list or

- d. Begin typing a task name or line number to select a different task.



- e. Click on **the right arrow** to open a panel where you can change the **dependency type** and/or add a **lead/lag** in the delay type.



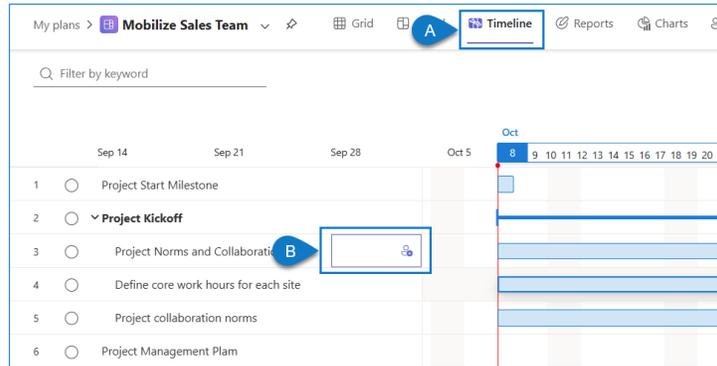
Assign Resources

 Project Manager

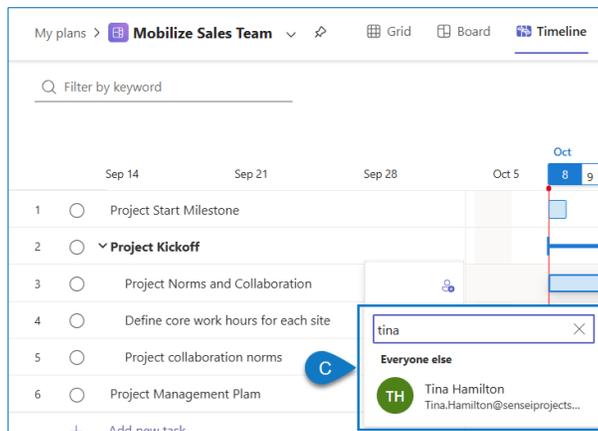
 Planner

1. ASSIGN RESOURCES IN THE TIMELINE VIEW

- a. Ensure you have the appropriate project open in **Planner** and ensure you are in the **Timeline** view.
- b. Hover your mouse to the immediate left of the Gantt bar left hand border to show the **hidden add resource icon** and click it.

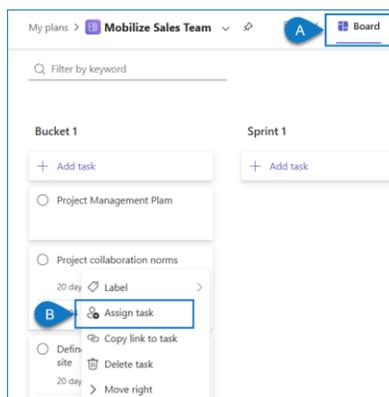


- c. Search for and **add the team member(s)** to the task.

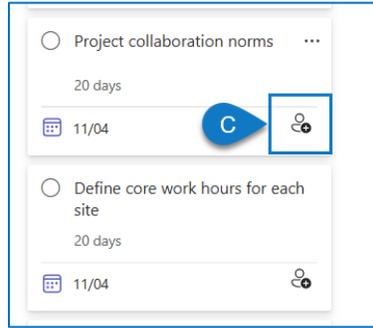


2. ASSIGN RESOURCES IN THE BOARD VIEW

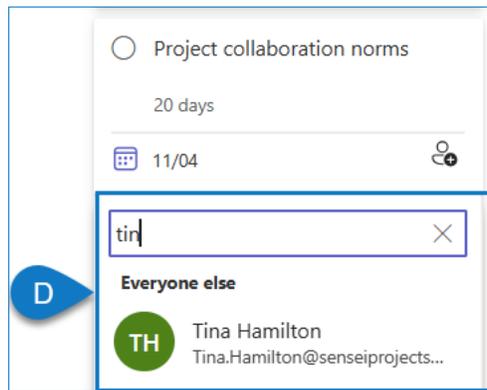
- a. Ensure you have the appropriate project open in **Planner** and ensure you are in the **Board** view.
- b. Hover your mouse over the card to show the **ellipsis** and click on it and then select **Assign task**.



- c. Or click on the **Assign Resource** Icon.

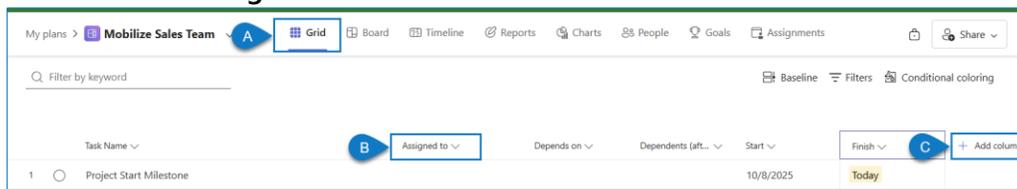


- d. Search for and add the **team member(s)**, or **select from the unassigned list** to them to the task.

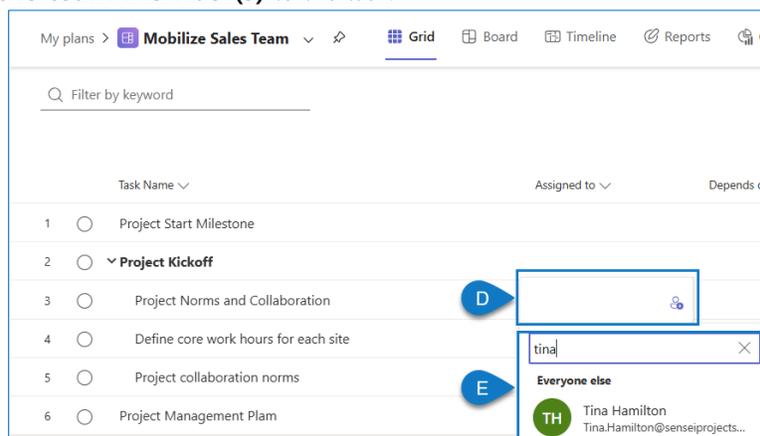


3. ASSIGN RESOURCES GRID VIEW

- a. Ensure you have the appropriate project open in **Planner** and ensure you are in the **Grid** view.
- b. Ensure that the **Assigned to** column is visible.
- c. Select **Add column** to add **Assigned to** if needed.



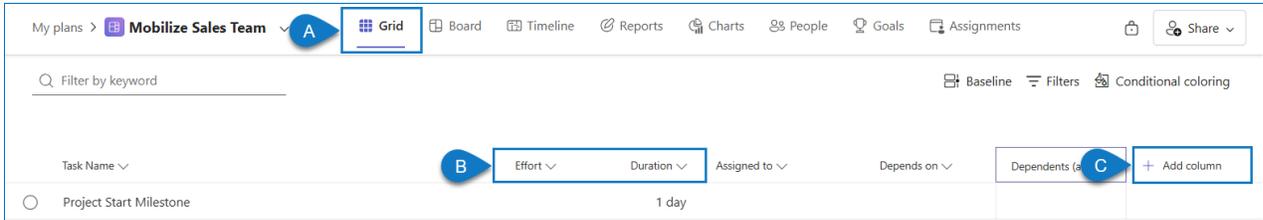
- d. Click in the **Assigned to** column and select the **Add Resource** icon.
- e. Search for and **add the team member(s)** to the task.



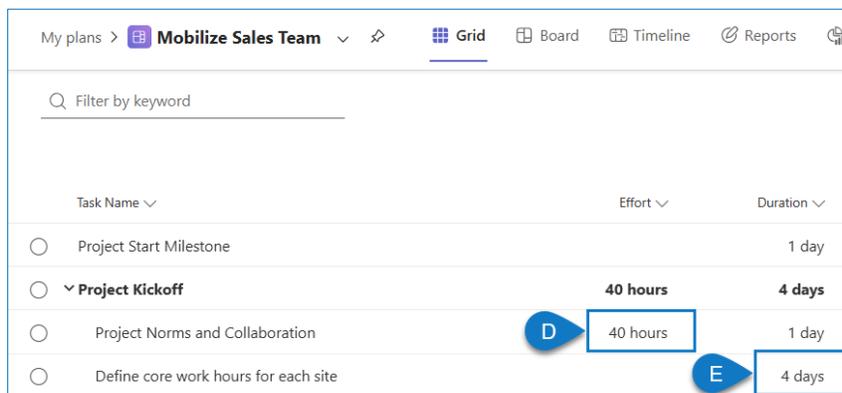
Estimate the work

1. ESTIMATING THE WORK IN THE GRID VIEW

- Ensure you have the appropriate project open in **Planner** and the **Grid view** selected.
- Ensure that you have the **Effort** and **Duration** columns visible.
- Click **Add column** to add one or both columns as needed.

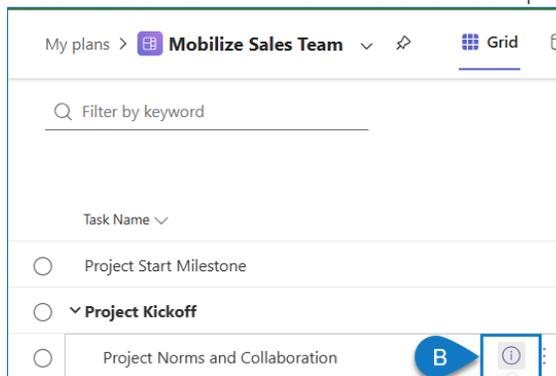


- Enter the task estimate in the **Effort** column based on estimating the amount of work required to complete the task or
- In the **Duration** column based on estimating how long the task will take.



2. ESTIMATING THE WORK IN THE TASK PANE

- Ensure you have the appropriate project open in **Planner**.
- In any view, hover your mouse over a task to activate the "i" icon and select it to open the task pane.



- Enter the task estimate in the **Effort remaining** box based on estimating the amount of work required to complete the task or
- In the **Duration** box based on estimating how long the task will take.

Project Kickoff

Project Norms and Collaboration

Assign to

Add label

Add a note...

Start

Finish

Duration **% Complete**

Bucket

Priority

Sprint

Checklist

Add an item

Effort

| Completed | Remaining | Total |
|---|---|--|
| <input 8h"="" type="text" value="E.g. "/> | <input 8h"="" type="text" value="E.g. "/> | <input 16h"="" type="text" value="E.g. "/> |